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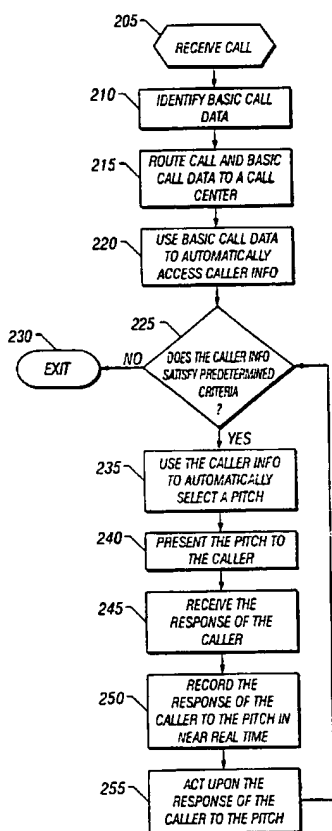


(57) **Abstract:** A first sales pitch appropriate for a particular telephone caller may be selected by receiving a call from a caller, accessing information about the caller, and automatically selecting the first sales pitch based upon the information accessed about the caller.

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# SMART TRANSFER

## TECHNICAL FIELD

This invention relates to selecting a sales pitch for a telephone caller.

## BACKGROUND

5    Advances in information technology have enhanced the ability of organizations to effectively offer services through telephone call centers. At the same time, the volume of individuals wishing to interact with various organizations has motivated those organizations to channel incoming calls through new or expanded telephone call centers. As a result, the number of incoming calls seeking information

10   or assistance from telephone call centers has increased significantly. These incoming calls represent a financial opportunity on which the telephone call centers of many organizations strive to capitalize by marketing various services and products to their callers during incoming calls.

## SUMMARY

15   In one general aspect, a first sales pitch appropriate for a particular telephone caller is selected by receiving a call from a caller, accessing information about the caller based on information gathered about the caller prior to the call, and automatically selecting a first sales pitch for the caller based upon the information accessed about the caller.

20   Implementations may include one or more of the following features. For example, the first sales pitch may be selected automatically only when the information accessed about the caller indicates that the caller satisfies certain predetermined criteria. For example, a sales pitch may not be selected for a caller where the information accessed about the caller indicates an unsatisfactory credit

25   status, or a caller preference to not receive any sales pitches. Moreover, a sales pitch may be made unavailable for selection for a caller based upon a geographic region of residence of the caller that is indicated in the information accessed about the caller.

Accessing information about the caller may include acquiring and storing information about the caller before receiving the call from the caller. Information also may be assessed automatically upon receiving the call from the caller.

The information accessed about the caller may include historical information

5   based on the caller's responses to past sales pitch offers. For example, the selected first sales pitch may be presented to the caller and information reflecting a response of the caller to the first sales pitch may be acquired and stored as part of the information about the caller. The acquisition and storage of the information reflecting the response of the caller may occur immediately after the caller provides the response to

10  the first sales pitch.

The information about the caller also may include, for example, information regarding enrollment by the caller in products or services offered by a commercial partner, or a name, an address, or a telephone number associated with the caller. Other examples include a credit status of the caller and or information concerning a

15  preference of the caller with respect to sales pitches.

The first sales pitch may be selected automatically, for example, by automatically determining a pool of available sales pitches for the caller including all sales pitches for which the caller has not been indicated ineligible by the information accessed about the caller. A sales pitch may be randomly selected from the available

20  pool. If the information accessed about the caller indicates that the caller is ineligible for the sales pitch, the sales pitch is removed from the pool of available sales pitches and another sales pitch is randomly selected. This process may be continued until random selection results in a sales pitch (e.g., the first sales pitch) for which the information about the caller indicates the caller is eligible.

25  An equal or uniform probability of selection may attach to each sales pitch in the pool of available sales pitches. Alternatively, the probability of selection may be non-uniform. For example, the pool of available sales pitches may include sub-pools of available sales pitches. Each sub-pool may be associated with a different probability defining the likelihood that a sales pitch will be selected from the sub-pool

30  of sales pitches in a given random selection.

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Automatically selecting the first sales pitch also may include automatically determining a pool of available sales pitches for the caller that includes only those sales pitches for which the caller is eligible as indicated by the information accessed about the caller. The first sales pitch may be randomly selected from the pool of

5    available sales pitches.

Alternatively, for example, the first sales pitch may be automatically selected by automatically comparing the information accessed about the caller to a sales pitch profile associated with a sales pitch to generate a comparison result. A sales pitch profile having an acceptable comparison result may be identified and a sales pitch

10   associated with the sales pitch profile may be selected as the first sales pitch.

Automatically selecting the first sales pitch also may include accessing a stored relationship between products and services of one commercial partner to sales pitches corresponding to products and services of another commercial partner.

A second sales pitch may be selected for the caller immediately after the caller

15   provides the response to the first sales pitch. The second sales pitch may be selected automatically based upon the information accessed about the caller including the information reflecting the response of the caller to the first sales pitch.

The caller also may be transferred to a commercial partner after the caller provides a response to the first sales pitch. In such a case, information accessed about

20   the caller may be communicated to the commercial partner substantially in real time. The communicated information about the caller may include, for example, a name, an address, and a telephone number associated with the caller as well as information regarding the response of the caller to the first sales pitch presented to the caller.

The commercial partner to which the caller is transferred may provide a good

25   or service that corresponds to the selected first sales pitch and may provide a second sales pitch to the caller. Feedback may be received from the commercial partner regarding a response of the caller to the second sales pitch and may be stored as part of the information accessed about the caller. The commercial partner may provide the feedback almost immediately after receiving the response of the caller to the second

30   sales pitch.

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These general and specific aspects may be implemented using a method, a system, or a computer program, or any combination of systems, methods, and computer programs.

Other features and advantages will be apparent from the description, the drawings, and the claims.

**DESCRIPTION OF DRAWINGS**

Fig. 1 is a is a schematic diagram of a system configured to select automatically an acceptable sales pitch for a caller.

Fig. 2 is a schematic flow diagram illustrating a systematic process implementable by the system of Fig. 1 for selecting automatically an acceptable sales pitch for a caller.

Fig. 3 is a table illustrating examples of caller information accessed in the process of Fig. 2.

Fig. 4 is a schematic flow diagram illustrating the use of basic call data to access the caller information as provided generally in Fig. 2.

Fig. 5 is a schematic flow diagram illustrating a random selection process that may be used to select an acceptable sales pitch as provided generally in Fig. 2.

Fig. 6 is a schematic flow diagram illustrating a process of comparing caller information with sales pitch profiles to select an acceptable sales pitch as provided generally in Fig. 2.

Figs. 7A and 7B are tables illustrating a sample of non-mutually exclusive sales pitch profiles and their relationship to caller information such as the caller information illustrated by Fig. 3.

Fig. 8 is a table illustrating a process for calculating a profile correlation value that may be used in implementing the process of Fig. 6.

Fig. 9 is a table illustrating a sales pitch look-up table that may be used in implementing the process of Fig. 6.

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Fig. 10 is a table illustrating sales pitches that may be accessed using the look-up table of Fig. 9 and also a probability distribution associated with the selection of the sales pitches.

Fig. 11 is a schematic flow diagram illustrating a process of recording the response of a caller to a sales pitch as provided in the process of Fig. 2.

Fig. 12 is a schematic flow diagram illustrating a process for acting upon the response of a caller to the sales pitch as provided in the process of Fig. 2, where the caller's response is a positive response to an offer to transfer the caller to a commercial partner for a detailed product or service offer.

Like reference symbols in the various drawings indicate like elements.

**DETAILED DESCRIPTION**

For illustrative purposes, a process is described for selecting a sales pitch for an incoming caller, and systems and software for implementing the process also are described. For clarity of exposition, the description proceeds from an account of general elements of the process, systems implementing the process, and their high level relationship, to a detailed account of illustrative roles, configurations, and components of the elements.

Referring to Fig. 1, a generalized system 100 may be used to select and present an appropriate sales pitch to a telephone caller 101. The exemplary components of the system 100 are described in greater detail below.

The system 100 of Fig. 1 may include a first call center 105 and a commercial partner call center 110. The call centers 105, 110 may be configured to communicate over a telephone network 115 and to receive calls through the telephone network 115 such as, for example, calls from the caller 101. The first call center 105 and the commercial partner call center 110 also may be configured to communicate over a computer network 120 with a smart transfer server 125. The smart transfer server 125 may be arranged to communicate with databases 130 and 140 that contain basic account information (database 130) and associated information (databases 140) about the caller 101.

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The first call center 105 is capable of receiving both voice and other data through a wired or wireless communication pathway 150 to the telephone network 115. The first call center 105 may include at least one smart transfer client 155 structured and arranged to receive the voice data 160 or the other data 165. The smart

5      transfer client 155 also may include one or more voice communications devices 170 arranged to receive voice communications by way of a voice data pathway. To receive other data, the smart transfer client 155 also may include one or more general-purpose or special-purpose computers (e.g., personal computer 175, personal digital assistants (PDAs), or devices specifically programmed to perform certain tasks such

10     as, for example, communicating with each other and/or the telephone network), or a combination of one or more of these devices. One or more other systems may be included in the smart transfer client 155. For example, the smart transfer client 155 may include one or more Local Area Networks (LANs) and/or one or more Wide Area Networks (WANs). The smart transfer client 155 also may be included as part

15     of another system. Software applications loaded on the smart transfer client 155 may be used to control the response to and execution of instructions received by the smart transfer client 155. Alternatively, or in addition, the response to and execution of instructions received by the smart transfer device 155 may be controlled by, for example, a program, a piece of code, an instruction, a device, a computer system, or a

20     combination thereof, for independently or collectively instructing the smart transfer client 155 to interact and operate as described herein.

The voice communications devices 170 included in the first call center 105 may typically include one or more hardware components and/or software components. Examples of voice communications devices 170 include an analog, a

25     digital, or a cellular telephone, whether wired or wireless, a program, a piece of code, an instruction, a device, a computer, a computer system, or a combination thereof, for independently or collectively sending or receiving voice communications. Implementations of voice communications devices 170 may exist permanently or temporarily in any type of machine, component, physical or virtual equipment,

30     storage medium, or propagated signal capable of sending or receiving voice communications.

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The commercial partner call center 110 may be configured in a manner similar to the first call center 105.

Either or both of the telephone network 115 and the computer network 120 may be structured and configured to provide computer telephone integration (CTI) so that voice and/or other data may be communicated over the networks 115, 120. The networks 115, 120 typically allow direct or indirect communication between parties, irrespective of physical separation. The networks 115, 120 may include various mechanisms for delivering voice and/or other data, such as, for example, analog or digital wired and wireless telephone networks, e.g., public switched telephone networks (PSTN), integrated services digital networks (ISDN), all types of digital subscriber lines (xDSL), advance mobile telephone service (AMPS), global system for mobile communications (GSM), or code division multiple access (CDMA). The networks 115, 120 also may include the Internet, the World Wide Web, one or more local area networks (LANs) and/or one or more wide area networks (WANs), radio, cable, satellite, and/or any other delivery mechanism for carrying voice or other data.

The smart transfer server 125 typically is configured to communicate and function together with at least one smart transfer client, e.g., smart transfer client 155. The smart transfer server 125 may include one or more hardware components and/or software components. For example, the smart transfer server 125 may include a general purpose computer (e.g., a personal computer, server, or workstation) capable of responding to and executing instructions in a defined manner. Other examples include a special-purpose computer, a device, a component, other physical or virtual equipment or some combination thereof capable of responding to and executing instructions. The response to and execution of instructions by the smart transfer server 125 may be controlled by a software application loaded on the smart transfer server 125; or, for example, by a program, a piece of code, an instruction, a device, a computer system, or a combination thereof, for independently or collectively instructing the smart transfer server 125 to interact and operate as described herein.

The smart transfer server 125 and the smart transfer client 155 typically include a communication device (not shown) for sending and/or receiving data from

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the computer network 120. One example of the communication device is a modem. Other examples include a transceiver, a set-top box, a communications card, a satellite dish, an antenna, or another network adapter capable of transmitting data to and/or receiving data from the computer network 120 through a wired or wireless pathway.

5    The smart transfer server 125 typically is configured to communicate with internal and/or external storage media 180 for storing data and programs. The storage media 180 may include electrical, magnetic, and/or optical storage media. The storage media 180 typically store sales pitches, sales pitch profiles, and/or a random selection list of available sales pitches 195. The sales pitch profiles and the random

10   selection list both may be used to select a sales pitch, for example, using processes described in greater detail with respect to Figs. 2, 5 and 6.

The smart transfer server 125 is configured and arranged to communicate with at least one first database 130 and at least one second database 140. The first database 130 may be, for example, a relational database, used to store and provide access to

15   basic account information associated with the caller 101. The second database 140 also may be a relational database. The second database 140 generally stores and enables access to information about the caller 101 that is associated with the basic account information. The databases 130 and 140 and the information that they contain, e.g., basic account information and associated information, may reside at any

20   appropriate location (e.g., local location, remote location, third party location), and also may reside on any appropriate storage medium 180 such as, for example, a magnetic disc array, or an optical disk array. These databases 130 and 140 may be contained in a single physical or logical structure, or they may be physically or logically distinct. Additionally, databases 130 and 140 may each form a single

25   database or several interconnected or accessible databases.

Referring to Fig. 2, a process 200 for selecting a sales pitch for an incoming caller 101 may, be implemented by, for example, the system of Fig. 1. When a call is received (step 205), basic call data associated with the call are identified (step 210). Basic call data may include, for example, a name associated with the caller 101, a

30   telephone number associated with the caller 101, and/or a geographic location of the

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caller 101. The call and the associated basic call data are routed to a call center (step 215), where stored information about the caller 101 is accessed automatically based on the associated basic call data (step 220), as discussed in detail with respect to Fig. 4.

5        The stored information about the caller 101 then is used to determine an appropriate subsequent action (step 225). If, for example, the stored information about the caller 101 fails to satisfy predetermined criteria, then no sales pitch is automatically selected for the caller 101 using this process (step 230). However, a sales pitch is automatically selected for the caller 101 using the stored information

10   about the caller 101 (step 235) if the stored information about the caller 101 satisfies the predetermined criteria, as discussed in more detail with respect to Figs. 5-8.

        The selected sales pitch is displayed at the call center and presented to the caller 101 (step 240). The call center receives a response of the caller 101 to the sales pitch (step 245) and information associated with the caller's response to the sales

15   pitch is recorded as part of the stored information about the caller (step 250). The information associated with the caller's response may be recorded substantially in real time (step 250), for example, after receiving the response of the caller (step 245) but before the response is acted upon (step 255) or the telephone call is terminated. Alternatively, the information associated with the caller's response may be recorded

20   immediately after the response has been received and acted upon (this alternative order of events is not shown in Fig. 2). Either case may be contrasted against the delayed batching of accumulated information associated with the responses of a significant numbers of callers. The process described is repeated, beginning at step 225, until the updated stored information about the caller does not satisfy the

25   predetermined criteria and the sales pitch selection process 200 is exited (step 230).

        Referring to Fig. 3, the information about the caller 300 may include basic account information 300A related to an account of the caller. The basic account information 300A may include, for example, the caller's account type 305 (e.g., Gold, Platinum, overhead, normal, internal), account status 310 (e.g., AAA, AAA+, active,

30   canceled, terminated, delinquent), and payment method 315 (e.g., credit, check,

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prepaid). The basic account information 300A may be related to a screen name of the caller and may be stored, referring to Fig. 1, in a first database 130.

Referring back to Fig. 3, the information about the caller 300 may include other information 300B associated with the basic account information 300A that may

5    be stored in at least one second database 140. The associated information 300B may include caller preference information 320, such as, for example, information indicating that the caller 101 has no sales pitch preference 322 or that the caller 101 prefers not to receive any sales pitches 329. The caller preference information 320 also may include information 324 indicating that the caller 101 prefers to be presented

10   a particular pitch, previously offered but which the caller 101 was unable to receive at the time of the offer. Additionally, the caller preference information 320 may include information 326 indicating that the caller 101 prefers sales pitches relating to a particular service or product provider's offers, or information 328 indicating that the caller 101 prefers not to receive sales pitches relating to a particular service or product

15   provider's offers. Moreover, the associated information may include historical information 330, such as historical information 332 related to which sales pitches have been presented to the caller 101, the time at which they were presented, and the caller's response to them. The historical information 330 also may include information 334 regarding past services or products purchased from the pitch

20   presenter or its commercial partners, and a listing 336 of services or products offered by the pitch presenter or its commercial partners in which the caller is currently enrolled, whether or not as a result of a sales pitch. Furthermore, the historical information may include information 338 regarding past misbehavior of the caller, such as, for example, information that the caller has behaved belligerently toward a

25   call center operator, information that the caller has behaved illegally (e.g., with respect to a pitched or subscribed product or service), and/or information that the caller has violated a terms of service (TOS) agreement associated with the caller's account. The associated information also may include a credit status 340 of the caller and demographic information 350 related to the caller. The demographic information

30   350 related to the caller 101 may include, for example, the sex 351, age 352, marital

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status 353, place of residence 354, avocation 355, and profession 356 of the caller 101.

Fig. 4 illustrates a process 220 for automatically accessing information about the caller 300. A screen name associated with the caller 101 may be accessed using

5    the basic call data (step 405). The screen name may be provided to the smart transfer client (e.g., 155 of Fig. 1) (step 410), which may pass the screen name to the smart transfer server (e.g., 125 of Fig. 1) through the network (e.g., 120 of Fig. 1) (step 415). The smart transfer server 125 may use the screen name to access basic account information 300A associated with the screen name from a first database (e.g., 130 of

10   Fig. 1) (step 420). The smart transfer server 125 then may use the accessed basic account information 300A to access the associated information 300B about the caller 101 stored in at least one second database (e.g., 140 of Fig. 1) (step 425). The associated information 300B may include information stored by a third party to the transaction, such as, for example, referring to Fig. 3, a credit status 340 stored by a

15   credit checking agency. The smart transfer server 125 then may return the basic account information 300A and the associated information 300B to the smart transfer client 155 as the information about the caller (step 430).

Figs. 5 and 6 illustrate examples of a process 235 for implementing a process for using the caller information 300 to determine a sales pitch, which process 235 also

20   may be generally applicable to step 1230 of Fig. 12. The smart transfer server 125 may use the accessed information about the caller to determine an acceptable sales pitch by, for example, performing a random sales pitch selection as discussed in relation to Fig. 5, or by performing a comparison to sales pitch profiles as discussed in relation to Fig. 6. It also is possible that the smart transfer server 125 will not access

25   information about the caller, for example, where no data is available about the caller. In such a situation, the first sales pitch may include an offer to subscribe to a default or basic service or product.

Referring to Fig. 5, one process for determining an acceptable sales pitch is described as the random selection process 235. When the caller information 300

30   indicates that the caller 101 does not wish to receive any sales pitches, that the caller

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101 is located outside of, for example, the United States of America, and/or that the caller has misbehaved (step 505), no pitch may be presented to the caller (step 510). Otherwise, a default random selection list may be initialized to list all available sales pitches and an initial probability distribution may be assigned to the random selection

5     list (step 515).  For example, a uniform probability distribution may be assigned such that an equal likelihood of selection exists for each sales pitch of the random selection list.  Alternatively, a non-uniform probability distribution may be assigned such that certain sales pitches or groups of sales pitches have a greater or lesser likelihood of selection from the random selection list (this also is illustrated with respect to Fig.

10    10).  For example, a probability distribution may be assigned to the random selection list to provide that internal sales pitches will be selected 25% of the time, that sales pitches corresponding to commercial partner A will be selected 35% of the time, that sales pitches corresponding to commercial partner B will be selected 30% of the time, and that sales pitches corresponding to commercial partner C will be selected 10% of

15    the time.  In like manner, a uniform or non-uniform probability distribution also may be assigned to the sales pitches associated with commercial partner A.  Following initialization, a random selection is made from the random selection list using the assigned probability distribution (step 520).

The random selection is compared to the information about the caller (step

20    525).  If the comparison indicates that the random selection is appropriate for the caller 101 (step 525), then the random selection is returned as the selected sales pitch (step 530).  A random selection might, for example, be deemed inappropriate for the caller 101 where the random selection is related to an offer of commercial partner A and the caller information indicates a caller preference to not receive sales pitches

25    related to offers of commercial partner A.  The random selection also might be inappropriate for the caller where the random selection is related to an offer of commercial partner A and the caller currently is enrolled in a product of commercial partner B, a competitor of commercial partner A.  If the comparison indicates that the random selection is inappropriate (step 525), then the random selection list is

30    modified to prevent repeat selection of the inappropriate random selection (step 535). The list also may be modified to prevent the random selection of other similarly

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inappropriate sales pitches. For example, all sales pitches related to offers of commercial partner A may be eliminated from selection when one sales pitch is determined inappropriate because of its relation to offers of commercial partner A. Following modification of the random selection list (step 535), another random
5      selection may be made (step 520) if the random selection list is not exhausted of available sales pitches (step 540). The process may be repeated until a qualified random selection is returned to the smart transfer client 155 as a selected sales pitch (step 530), or until the random selection list is exhausted and the sales pitch selection process is exited with no pitch (step 510).

10          Referring to Fig. 6, an alternative process 235 for determining an acceptable sales pitch produces a comparison result by comparing the caller information 300 against stored sales pitch profiles 610 that are associated with sales pitches 615 (step 605). The comparison may be performed for each sales pitch profile 610 or selected sales pitch profiles 610. Based upon the comparison results, one or more sales pitch
15     profiles 610 with acceptable comparison results are identified (step 620), and one or more sales pitches 615 associated with the identified sales pitch profiles are selected (step 625) and returned to the smart transfer client 155 (step 630).

          Figs. 7A and 7B illustrate two different sales pitch profiles that share a common form. For ease of description, aspects of the sales pitch profile of Fig. 7A
20     are described in detail and a description of corresponding aspects of the sales pitch profile of Fig. 7B is omitted for brevity.

          Referring to Fig. 7A, a sales pitch profile 700A includes, by way of example, different match criterion 705A that correspond to data-fields 710A in the caller information 300. As part of identifying a sales pitch profile (e.g., steps 605 and 620
25     of Fig. 6), The smart transfer server 125 compares the caller information 300 that is accessed in the caller information data-fields 710A against the respective match criteria 705A of the sales pitch profile 700A. An example of results 715A of the comparison is shown in the far right hand column of the table of Fig. 7A.

          For example, the caller information data-field "method of payment" 720A
30     may have an associated match criterion 725A indicating acceptance of a credit card as

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the method of payment. The caller information 730A accessed in the method of payment data-field 720A also shows that a credit card is the method of payment of the caller. Hence, the match criterion 725A is satisfied and a match is indicated 735A. By contrast, referring to Fig. 7B, the match criterion 725B requires a check as the

5      method of payment. The caller information 730B accessed in the method of payment data field 720B shows "credit card" to be the caller's method of payment such that the match criterion 725B is not satisfied and the unsatisfactory result is indicated 735B.

A sales pitch profile 610 may completely match the caller information (not shown). However, in Figs. 7A and 7B, only a partial match is achieved as shown in

10     the data-field by data-field match fields 715A, 715B. Alternatively, there also may be a complete failure to match (not shown).

In one implementation (not shown), the caller information is used by the smart transfer server 125 to identify a completely matching sales pitch profile 610. In this implementation, the sales pitch profiles 610 are configured such that one and only one

15     sales pitch profile 610 provides a complete match relative to the caller information 300. In a simplified example, the universe of possible callers may be divided by two sales pitch profiles into those whose method of payment is by credit card and those whose method of payment is by some other means. Thus configured, one, and only one, of the two sales pitch profiles may be satisfied, i.e., any match is an exclusive

20     match.

In general, however, sales pitch profiles 610 need not be configured to ensure exclusive matches. The sales pitch profiles 700A and 700B of Figs. 7A and 7B are examples of profiles in which any match tends to be a matter of degree. In such an arrangement, a sales pitch profile 610 may be selected for a caller 101 through some

25     mathematical comparison of, for example, various comparison results. A numerical value, also known as the profile correlation value, may be reduced from the match criteria, comparison results, or other criteria to enable such comparison.

Referring again to Fig. 6, a comparison result may include a profile correlation value that may be determined with respect to the caller information for each sales

30     pitch profile (step 605). A sales pitch profile 610 with an acceptable, and perhaps

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best, profile correlation value is identified and used to identify a sales pitch 615 associated with the sales pitch profile 610 (step 620). A profile correlation value provides an indirect metric of the acceptability of a particular sales pitch 615 for presentation to the caller 101.

5      Referring to Fig. 8, the profile correlation value 805 may include a summation of weighted match values 810, where each match criterion 815 is used to produce an associated match value 820. The weighted match values 810, in turn, may include the result of the multiplication of a criterion weight 825 associated with a match criterion 815 by a match value 820 that may be "1" where the match criterion 815 is satisfied

10     or by a number that may be "–1" where the match criterion 815 is not satisfied, for example. Also, a zero may be used for a criterion weight 825 when a match criterion 815 always will be satisfied because it is configured to include all possible callers, for example, the match criteria for sex 830 and avocation 835. To illustrate, with respect to the account status field 840, the match criterion 845 is assigned a criterion weight

15     850 of "2". However, the match criterion 845 is not satisfied by the caller information 855 accessed in the account status field 840. Therefore, the criterion weight 850 is multiplied by a match 860 value of "-1" to produce a weighted match value 865 of "-2". By contrast, with respect to the account type field 870, the match criterion 875 is assigned a criterion weight 880 of "1" and the match criterion 875 is

20     satisfied by the caller information 883 accessed in the account type field 870. Therefore, the criterion weight 880 is multiplied by a match value 885 of "1" to produce a weighted match value 890 of "1". Furthermore, with respect to the avocation field 891, the match criteria 835 is specified as "any" such that a criteria weight 892 of zero is used to arrive at a weighted match value 893 of zero. A similar

25     process is followed to arrive at a weighted match value 810 for each match criterion 815. All weighted match values 810 are then summed to arrive at a profile correlation value 805 of "-27."

The described weighting process of Fig. 8 provides a mechanism to emphasize one or more certain match criterion deemed important relative to other match

30     criterion. Moreover, it may be desirable that the magnitude of a weighted match

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value differ depending upon whether a match was determined to exist. For example, it may be desirable that an appropriate weighted match value dominate a profile correlation value when a caller 101 is indicated as preferring to receive no sales pitches and/or has a history of misbehavior. However, when a caller 101 is indicated

5   as having no preference regarding sales pitches, and/or has no history of misbehavior, it is unlikely to be equally desirable that the appropriate weighted match value dominate the final profile correlation value. Examining caller preference by way of illustration, the match value 894 corresponding to a failed match for the caller preference data-field 895 may be set at an appropriate scaling value, such as, for

10  example, "–1", in combination with a high value, such as, for example, "20", for the corresponding criterion weight 896 to produce a weighted match value 897 of "–20" designed to have a dominating effect upon the profile correlation value 805. It may be desirable to avoid a similar dominating effect when the caller 101 prefers to receive at least some sales pitches. In that case, the match value 894 may be assigned

15  an appropriate scaling value such as, for example, zero or a very small positive non-zero value (not shown).

Once a sales pitch profile is identified, the sales pitch profile may be used to index a sales pitch look-up table 900, as shown in Fig. 9, that associates sales pitches 615 with the sales pitch profiles 610.

20  Fig. 10 illustrates five sales pitches 1005, 1010, 1015, 1020, and 1025 that may be accessed using the sales pitch look-up table of Fig. 9. The five sales pitches generally are similar. Sales pitch 1005 is a sales pitch used to pitch a product or service offered by the pitch presenter. The sales pitches 1010, 1015, 1020, and 1025 are used to pitch the products or services of commercial partners (e.g., partner A,

25  partner B, partner C).

Fig. 11 illustrates a process 250 for recording the response of the caller to the sales pitch, which process 250 also may be generally applicable to step 1245 of Fig. 12. After receiving the response of the caller, the smart transfer client 155 may generate a feedback message containing information related to the response of the

30  caller (step 1105). The smart transfer client 155 then may communicate the feedback

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message to the smart transfer server 125 through the network 120 (step 1110). The smart transfer server 125 may update the first and second databases 130 and 140 using the information in the feedback message (step 1115).

Fig. 12 illustrates, by way of example, a process 255 for acting upon a positive response of the caller to such a sales pitch. The particular course taken in acting upon the response of a caller to a sales pitch may depend upon the nature of the sales pitch presented to the caller. For example, a sales pitch may include an offer to sell a product or provide a service. The offeror may act upon the response of the caller by signing up the caller 101 for the product or service where the caller's response indicates interest in the product or service. Where the caller 101 expresses a lack of interest in the product or service, no substantive action may be taken. A sales pitch also may include an offer to transfer the caller 101 to a commercial partner for a detailed offer about a product or service offered by the commercial partner (referred to hereinafter as a transfer sales pitch).

Initially, the smart transfer client 155 of the first call center 105 requests the telephone network 115 to transfer an incoming call to a smart transfer client 112 of the commercial partner 110 (CP smart transfer client) (step 1205). Upon receiving the transfer request, the telephone network 115 transfers the call to the CP smart transfer client 112 (step 1210). As part of the transfer of the call, a caller information key (not shown) may be communicated from the smart transfer client 155 to the CP smart transfer client 112. The CP smart transfer client 112 may access the stored caller information that includes information regarding the transfer sales pitch (step 1215), e.g., using the caller information key. The stored information about the caller is used to determine what further action to take (step 1215). If, for example, the stored information about the caller fails to satisfy predetermined criteria (step 1220), it is possible that no sales pitch will be selected for the caller (step 1225). However, if the stored information about the caller satisfies the predetermined criteria (step 1220), the stored information about the caller may be used to automatically select a sales pitch for the caller (step 1230).

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Typically, the information regarding the caller is used to select a sales pitch associated with the transfer sales pitch. The selected sales pitch may then be displayed at the call center and presented to the caller (step 1235). The call center receives a response of the caller to the sales pitch (step 1240) and information

5    associated with the response of the caller to the sales pitch is recorded as part of the stored information about the caller (step 1245). The recording of the information associated with the response of the caller (step 1245) may occur in near real time, for example, after receiving the response of the caller (step 1240) but before the response is acted upon (step 1250) or the telephone call is terminated, or, alternatively,

10   immediately after the response is acted upon (step 1250). This is in contrast to the delayed batching of accumulated information associated with the responses of a significant numbers of callers. After the response is acted upon, process 255 is repeated, beginning at step 1220, until the updated stored information about the caller does not satisfy the predetermined criteria such that another different pitch is not

15   selected for the caller (step 1225).

The process 255 of Fig. 12, as described, is capable of self-referential repetition, namely recursion. For example, the commercial partner may itself present a different transfer sales pitch to the caller, making the process 255 of Fig. 12 appropriate where the caller 101 expresses interest in the different transfer sales pitch.

20   Also, examination of Figs. 2 and 12 reveals that steps 1220 to 1250 of Fig. 12 correspond to steps 225 to 255 of Fig. 2.

Other implementations are within the scope of the following claims.

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WHAT IS CLAIMED IS:

1. A process for selecting a first sales pitch appropriate for a particular telephone caller, the process comprising:

receiving a call from a caller;

accessing information about the caller gathered prior to the call; and

5          automatically selecting a first sales pitch appropriate for the caller based upon the information accessed about the caller.

2. The process of claim 1 wherein the first sales pitch is automatically selected before the call is transferred to a human operator.

3. The process of claim 1 wherein the first sales pitch is automatically selected

10        only when the information accessed about the caller indicates that the caller satisfies certain predetermined criteria.

4. The process of claim 2 wherein accessing the information about the caller includes accessing a geographic residence of the caller, and automatically selecting the first sales pitch includes making a sales pitch unavailable for selection for the

15        caller based upon the geographic residence of the caller.

5. The process of claim 2 wherein accessing the information about the caller includes accessing a credit status for the caller, and automatically selecting a first sales pitch includes selecting the first sales pitch for a caller only when the caller is determined to have a satisfactory credit status.

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6. The process of claim 1 wherein accessing information about the caller includes acquiring and storing a response by the caller to the selected first sales pitch as part of the information about the caller.

7. The process of claim 1 further comprising presenting the first sales pitch to the caller, and wherein accessing information about the caller includes acquiring and storing information reflecting a response to the first sales pitch by the caller as part of the information about the caller immediately after the caller provides the response to the first sales pitch.

8. The process of claim 7 further comprising selecting a second sales pitch for the caller immediately after the caller provides the response to the first sales pitch, wherein the second sales pitch is selected automatically based on the information accessed about the caller including the information reflecting the response by the caller to the first sales pitch.

9. The process of claim 8 wherein the second sales pitch is provided to the caller during the phone call if the response by the caller to the first sales pitch was favorable.

10. The process of claim 9 wherein the second sales pitch is provided to the caller during the phone call if the response by the caller to the first sales pitch was not favorable.

11. The process of claim 1 wherein accessing information about the caller includes acquiring and storing information about the caller before receiving the call from the caller and wherein the stored information about the caller is accessed automatically upon receiving the call from the caller.

20

12. The process of claim 1 wherein the information accessed about the caller comprises historical information based on responses made by the caller in response to past sales pitch offers.

13. The process of claim 1 wherein the information accessed about the caller comprises historical information based on past misbehavior of the caller, and wherein the past misbehavior includes a violation by the caller of a terms of service agreement associated with an account of the caller.

14. The process of claim 1 wherein the information accessed about the caller comprises information regarding current enrollment by the caller in products or services offered by a commercial partner.

15. The process of claim 1 wherein the information accessed about the caller comprises information relating to an address of the caller such that the first sales pitch is selected automatically based on the information relating to the address of the caller.

16. The process of claim 1 further comprising:

presenting the selected first sales pitch to the caller; and

transferring the caller to a commercial partner that provides a product or service that corresponds to the selected first sales pitch if the caller has expressed interest in the first sales pitch.

17. The process of claim 16 further comprising communicating information accessed about the caller to the commercial partner substantially in real time.

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18. The process of claim 17 wherein the information comprises a name of the caller.

19. The process of claim 17 wherein the information comprises an address and telephone number of the caller.

5      20. The process of claim 17 wherein the information comprises information regarding the first sales pitch presented to the caller.

21. The process of claim 17 wherein the information comprises information regarding the response by the caller to the first sales pitch presented to the caller.

22. The process of claim 1, further comprising:

10      transferring the caller to a commercial partner that provides a product or service that corresponds to the selected first sales pitch, wherein the commercial partner provides a second sales pitch to the caller; and

receiving feedback information from the commercial partner regarding a response by the caller to the second sales pitch after the response to the second sales 15    pitch is received from the caller by the commercial partner.

23. The process of claim 22 wherein the commercial partner provides the feedback information regarding the response by the caller immediately after the response to the second sales pitch is received from the caller by the commercial partner.

20      24. The process of claim 23 wherein the feedback information is stored as information accessed about the caller to be used for selecting sales pitches in the future.

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25. The process of claim 1 wherein automatically selecting the first sales pitch comprises:

automatically determining a pool of available sales pitches for the caller including all sales pitches for which the caller has not been indicated ineligible by the

5    information accessed about the caller; and

randomly selecting the first sales pitch from the pool of available sales pitches.

26. The process of claim 25 wherein automatically selecting further includes removing a sales pitch from the pool of available sales pitches after the sales pitch is selected at random from the pool of available sales pitches and the information

10    accessed about the caller indicates that the caller is ineligible for the randomly selected sales pitch.

27. The process of claim 25 wherein each sales pitch within the pool of available sales pitches has an equal probability of random selection when the random selection is made.

15        28. The process of claim 25 wherein the pool of available sales pitches comprises sub-pools of available sales pitches that each have an associated parameter that defines the likelihood that a sales pitch will be selected from the sub-pool of sales pitches when the random selection is made.

29. The process of claim 1 wherein automatically selecting the first sales pitch

20    comprises: automatically determining a pool of available sales pitches for the caller including only those sales pitches for which the caller is eligible as indicated by the information accessed about the caller; and

randomly selecting the first sales pitch from the pool of available sales pitches.

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30. The process of claim 29 wherein automatically determining the pool of available sales pitches for the caller includes selecting available sales pitches for the caller based upon a caller preference indicated by the information accessed about the caller.

5       31. The process of claim 1 wherein automatically selecting the first sales pitch comprises:

automatically comparing the information accessed about the caller to a sales pitch profile associated with a sales pitch; and

generating a comparison result based upon the comparison of the information
10      accessed about the caller and the sales pitch profile.

32. The process of claim 31 further comprising determining and storing the sales pitch profile before comparing the information accessed about the caller to the sales pitch profile associated with the sales pitch.

33. The process of claim 32 further comprising accessing the sales pitch
15      profile after determining and storing the sales pitch profile and prior to comparing the information accessed about the caller to the sales pitch profile associated with the sales pitch.

34. The process of claim 31 further comprising determining a sales pitch profile having an acceptable comparison result and selecting a sales pitch associated
20      with the sales pitch profile having the acceptable comparison result as the first sales pitch.

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35. The process of claim 1 further comprising storing a relationship between products and services of one commercial partner to sales pitches corresponding to products and services of another commercial partner prior to receiving the call from the caller, wherein automatically selecting includes accessing the relationship between
5   products and services of the one commercial partner to sales pitches corresponding to products and services of the other commercial partner.

36. A system for selecting a first sales pitch appropriate for a particular telephone caller, the system comprising:

receiving means for receiving a call from a caller;

10   accessing means for accessing information about the caller gathered prior to the call; and

selecting means for automatically selecting a first sales pitch appropriate for the caller based upon the information accessed about the caller.

37. The system of claim 36 further comprising transferring means for
15   transferring the call to a human operator, and wherein the first sales pitch is selected automatically by the selecting means before the transferring means transfers the call to the human operator.

38. The system of claim 36 wherein the first sales pitch is selected automatically by the selecting means only when the information accessed about the
20   caller by the accessing means indicates that the caller satisfies certain predetermined criteria.

39. The system of claim 37 wherein the accessing means accesses information indicating a geographic residence of the caller, and the selecting means automatically makes a sales pitch unavailable for selection for a caller based upon the geographic
25   residence of the caller.

25

40. The system of claim 37 wherein the accessing means also accesses a credit status for the caller and the selecting means selects a first sales pitch for the caller only when the credit status of the caller satisfies predetermined credit criteria.

41. The system of claim 36 wherein the accessing means includes an acquiring
5　means for acquiring a response by the caller to the selected first sales pitch and a storing means for storing the acquired response by the caller as part of the information about the caller.

42. The system of claim 36, further comprising a presenting means for presenting the first sales pitch to the caller, and wherein the accessing means includes
10　an acquiring means for acquiring a response by the caller to the selected first sales pitch and a storing means for storing the acquired response by the caller as part of the information about the caller immediately after the caller provides the response to the first sales pitch .

43. The system of claim 42, further comprising a second selecting means for
15　selecting a second sales pitch for the caller immediately after the caller provides the response to the first sales pitch, wherein the second sales pitch is selected automatically based on the information accessed by the accessing means about the caller including the information reflecting the response by the caller to the first sales pitch.

20　44. The system of claim 36 wherein the accessing means includes an acquiring means for acquiring information about the caller and a storing means for storing the acquired information about the caller before the receiving means receives the call from the caller and wherein the accessing means also includes a retrieving means for automatically retrieving the stored information accessed about the caller upon
25　receiving the call from the caller.

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45. The system of claim 36 wherein the information that the accessing means accesses about the caller comprises historical information based on responses made by the caller in response to past sales pitch offers.

46. The system of claim 36 wherein the information that the accessing means accesses about the caller comprises historical information based on past misbehavior of the caller, and wherein the past misbehavior includes a violation by the caller of a terms of service agreement associated with an account of the caller.

47. The system of claim 36 wherein the information that the accessing means accesses about the caller comprises information regarding current enrollment by the caller in products or services offered by a commercial partner.

48. The system of claim 36 further comprising:

presenting means for presenting the selected first sales pitch to the caller; and

transferring means for transferring the caller to a commercial partner that provides a product or service that corresponds to the selected first sales pitch if the caller has expressed interest in the first sales pitch.

49. The system of claim 48 further comprising communicating means for communicating information that the accessing means accesses about the caller to the commercial partner substantially in real time.

50. The system of claim 49 wherein the information communicated by the communicating means comprises information regarding the first sales pitch presented to the caller by the presenting means.

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51. The system of claim 49 wherein the information communicated by the communicating means comprises information regarding the response by the caller to the first sales pitch presented to the caller by the presenting means.

52. The system of claim 36, further comprising:

5      transferring means for transferring the caller to a commercial partner that provides a product or service that corresponds to the selected first sales pitch, wherein the commercial partner provides a second sales pitch to the caller; and

feedback means for receiving feedback information from the commercial partner regarding a response by the caller to the second sales pitch after the response

10 . to the second sales pitch is received from the caller by the commercial partner.

53. The system of claim 52 wherein the commercial partner provides feedback information to the feedback means regarding the response by the caller almost immediately after the response to the second sales pitch is received from the caller by the commercial partner.

15      54. The system of claim 53 wherein the accessing means includes a storing means for storing the feedback information as part of the information about the caller to be used for selecting sales pitches in the future.

. 55. The system of claim 36 wherein the selecting means comprises:

a pool determination means for automatically determining a pool of available

20    sales pitches for the caller including all sales pitches for which the caller has not been indicated ineligible by the information accessed by the accessing means about the caller; and

a random selection means for randomly selecting the first sales pitch from the pool of available sales pitches.

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56. The system of claim 55 wherein the selecting means further includes a removing means for removing a sales pitch from the pool of available sales pitches after the sales pitch is selected at random from the pool of available sales pitches and the information accessed about the caller by the accessing means indicates that the

5       caller is ineligible for the randomly selected sales pitch.

57. The system of claim 55 wherein the pool determination means includes a probability determination means for determining a probability of random selection for the sales pitches comprising the pool of available sales pitches so that each sales pitch within the pool of available sales pitches has an equal probability of random selection

10      when a random selection is made.

58. The system of claim 55 wherein the pool determination means determines a pool of available sales pitches comprised of sub-pools of available sales pitches and wherein the probability determination means determines a probability associated with a sub-pool of available sales pitches that defines the likelihood that a sales pitch will

15      be selected from the sub-pool of sales pitches when a random selection is made.

59. The system of claim 36 wherein the selecting means comprises:

comparing means for automatically comparing the information accessed about the caller by the accessing means to a sales pitch profile associated with a sales pitch; and

20          generating means for generating a comparison result based upon the comparison of the information accessed about the caller and the sales pitch profile.

60. The system of claim 59 further comprising:

profile determining means for determining the sales pitch profile before the comparison by the comparing means;

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profile storing means for storing the sales pitch profile before the comparison by the comparing means; and

profile accessing means for accessing the sales pitch profile before the comparison by the comparing means.

5 61. The system of claim 60 further comprising:

acceptable profile determining means for determining a sales pitch profile having an acceptable comparison result; and

sales pitch selecting means for selecting as the first sales pitch a sales pitch associated with the sales pitch profile having the acceptable comparison result.

10 62. The system of claim 36 further comprising a relationship storing means for storing a relationship between products and services of one commercial partner to sales pitches corresponding to products and services of another commercial partner prior to the receiving means receiving the call from the caller, wherein the selecting means includes accessing means for accessing the relationship between products and

15 services of the one commercial partner to sales pitches corresponding to products and services of the other commercial partner.

63. A computer program stored on a computer readable medium or a propagated signal for selecting a first sales pitch appropriate for a particular telephone caller, the computer program comprising:

20 a receiving code segment that causes the computer to receive a call from a caller;

an accessing code segment that causes the computer to access information about the caller gathered prior to the call; and

a selecting code segment that causes the computer to automatically select a

25 first sales pitch appropriate for the caller based upon the information accessed about the caller.

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64. The computer program of claim 63 further comprising a transferring code segment that causes the computer to transfer the call to a human operator, and wherein the selecting code segment causes the computer to automatically select a first sales pitch before the transferring code segment causes the computer to transfer the call to

5    the human operator.


65. The computer program of claim 63 wherein the selecting code segment causes the computer to automatically select the first sales pitch only when the information accessed about the caller indicates that the caller satisfies certain. predetermined criteria.


10    66. The computer program of claim 64 wherein the accessing code segment causes the computer to access information indicating a geographic residence of the caller, and the selecting code segment causes the computer to automatically make a sales pitch unavailable for selection for a caller based upon the geographic residence of the caller.


15    67. The computer program of claim 64 wherein the accessing code segment further causes the computer to access information indicating a credit status for the caller and the selecting code segment causes the computer to select a first sales pitch for the caller only when the credit status of the caller satisfies predetermined credit criteria.


20    68. The computer program of claim 63 wherein the accessing code segment includes: an acquiring code segment that causes the computer to acquire a response by the caller to the selected first sales pitch; and


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a storing code segment that causes the computer to store the acquired response by the caller as part of the information about the caller.

69. The computer program of claim 63, further comprising a presenting code segment that causes the computer to present the first sales pitch to the caller, and

5    wherein the accessing code segment includes:

an acquiring code segment that causes the computer to acquire a response by the caller to the selected first sales pitch; and

a storing code segment that causes the computer to store the acquired response by the caller as part of the information about the caller immediately after the caller

10   provides the response to the first sales pitch .

70. The computer program of claim 69, further comprising a second selecting code segment that causes the computer to select a second sales pitch for the caller immediately after the caller provides the response to the first sales pitch, wherein the computer selects the second sales pitch automatically based on the information that

15   the accessing code segment causes the computer to access about the caller including the information reflecting the response by the caller to the first sales pitch.

71. The computer program of claim 63 wherein the accessing code segment includes:

an acquiring code segment that causes the computer to acquire information

20   about the caller; and

a storing code segment that causes the computer to store the acquired information about the caller before the receiving code segment causes the computer to receive the call from the caller; and

wherein the accessing code segment also includes a retrieving code segment

25   that causes the computer to automatically retrieve the stored information accessed about the caller upon receiving the call from the caller.

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72. The computer program of claim 63 wherein the information that the accessing code segment causes the computer to access about the caller comprises historical information based on responses made by the caller in response to past sales pitch offers.

73. The computer program of claim 63 wherein the information that the accessing code segment causes the computer to access about the caller comprises historical information based on past misbehavior of the caller, and wherein the past misbehavior includes a violation by the caller of a terms of service agreement associated with an account of the caller.

74. The computer program of claim 63 wherein the information that the accessing code segment causes the computer to access about the caller comprises information regarding current enrollment by the caller in products or services offered by a commercial partner.

75. The computer program of claim 63 further comprising:

a presenting code segment that causes the computer to present the selected first sales pitch to the caller; and

a transferring code segment that causes the computer to transfer the caller to a commercial partner that provides a product or service that corresponds to the selected first sales pitch if the caller has expressed interest in the first sales pitch.

76. The computer program of claim 75 further comprising a communicating code segment that causes the computer to communicate information accessed about the caller to the commercial partner substantially in real time.

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77. The computer program of claim 76 wherein the information that the communicating code segment causes the computer to communicate comprises information regarding the first sales pitch presented to the caller.

78. The computer program of claim 76 wherein the information that the
5   communicating code segment causes the computer to communicate comprises information regarding the response by the caller to the first sales pitch presented to the caller.

79. The computer program of claim 63, further comprising:

a transferring code segment that causes the computer to transfer the caller to a
10   commercial partner that provides a product or service that corresponds to the selected first sales pitch, wherein the commercial partner provides a second sales pitch to the caller; and

a feedback code segment that causes the computer to receive feedback information from the commercial partner regarding a response by the caller to the
15   second sales pitch after the response to the second sales pitch is received from the caller by the commercial partner.

80. The computer program of claim 79 wherein the feedback code segment causes the computer to receive feedback information provided by the commercial partner regarding the response by the caller almost immediately after the response to
20   the second sales pitch is received from the caller by the commercial partner.

81. The computer program of claim 80 wherein the accessing code segment includes a storing code segment that causes the computer to store the feedback information as part of the information about the caller to be used for selecting sales pitches in the future.

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82. The computer program of claim 63 wherein the selecting code segment comprises:

a pool determination code segment that causes the computer to automatically determine a pool of available sales pitches for the caller including all sales pitches for

5    which the caller has not been indicated ineligible by the information accessed about the caller; and

a random selection code segment that causes the computer to randomly select the first sales pitch from the pool of available sales pitches.

83. The computer program of claim 81 wherein the selecting code segment

10   further includes a removing code segment that causes the computer to remove a sales pitch from the pool of available sales pitches after the sales pitch is selected at random from the pool of available sales pitches and the information accessed about the caller indicates that the caller is ineligible for the randomly selected sales pitch.

84. The computer program of claim 82 wherein the pool determination code

15   segment includes a probability determination code segment that causes the computer to determine a probability of random selection for the sales pitches comprising the pool of available sales pitches so that each sales pitch within the pool of available sales pitches has an equal probability of random selection when a random selection is made.

20       85. The computer program of claim 82 wherein the pool determination code segment causes the computer to determine a pool of available sales pitches comprised of sub-pools of available sales pitches, and wherein the probability determination code segment causes the computer to determine a probability associated with a sub-pool of available sales pitches that defines the likelihood that a sales pitch will be

25   selected from the sub-pool of sales pitches when a random selection is made.

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86. The computer program of claim 63 wherein the selecting code segment comprises:

a comparing code segment that causes the computer to automatically compare the information accessed about the caller to a sales pitch profile associated with a

5    sales pitch; and

a generating code segment that causes the computer to generate a comparison result based upon the comparison of the information accessed about the caller and the sales pitch profile.


87. The computer program of claim 86, wherein, before the comparing code

10   segment causes the computer to automatically compare the information accessed about the caller to the sales pitch profile associated with the sales pitch, the computer program further comprises:

a profile determining code segment that causes the computer to determine the sales pitch profile;

15   a profile storing code segment that causes the computer to store the sales pitch profile; and

a profile accessing code segment that causes the computer to access the sales pitch profile.


88. The computer program of claim 86 further comprising:

20       an acceptable profile determining code segment that causes the computer to determine a sales pitch profile having an acceptable comparison result; and

a sales pitch selecting code segment that causes the computer to select as the first sales pitch a sales pitch associated with the sales pitch profile having the acceptable comparison result.

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89. The computer program of claim 63 further comprising a relationship storing code segment that causes the computer to store a relationship between products and services of one commercial partner to sales pitches corresponding to products and services of another commercial partner prior to the receiving code

5    segment causing the computer to receive the call from the caller, wherein the selecting code segment includes an accessing code segment that causes the computer to access the relationship between products and services of the one commercial partner to sales pitches corresponding to products and services of the other commercial partner.

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**FIG. 1**

**FIG. 2**

*300*

| CALLER INFORMATION |
|---|
| *Basic Account Information* |
| 305 — • account type |
| 310 — • account status |
| 315 — • method of payment |
| *Associated Information* |
| 320 — Caller Preference Information |
| 322 — • no preferences regarding any partner or offer, or |
| 324 — • interested in a particular offer but did not have time to receive pitch during last call, or |
| 326 — • interested in pitches relating to a particular partner's offers, or |
| 328 — • not interested in pitches relating to a particular partner's offers, or |
| 329 — • not interested in any offers |
| 330 — Historical Information |
| 332 — • history of past pitches presented |
| 334 — • history of services or products purchased from pitch presenter or partners |
| 336 — • listing of services or products currently enrolled in by caller |
| 338 — • history of caller misbehavior (e.g., belligerent, illegal, TOS violation) |
| 340 — Credit Status of Caller |
| 350 — Caller Demographic Information |
| 351 — • sex |
| 352 — • age |
| 353 — • marital status |
| 354 — • place of residence |
| 355 — • avocation |
| 356 — • profession |

300A { (Basic Account Information section)

300B } (Associated Information section)

**FIG. 3**

220

```
┌─────────────────┐
│ Determine caller│
405 ─│ screen name from│
│ basic call data │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ Provide screen  │
410 ─│ name to Smart   │
│ Transfer client │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ Smart Transfer  │
│ client requests │
415 ─│ customer info by│
│ passing screen  │
│ name to Smart   │
│ Transfer server │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ Using the screen│
│ name the Smart  │
420 ─│ Transfer server │
│ retrieves basic │
│ account info from│
│ a database      │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ Using the basic │
│ account info the│
│ Smart Transfer  │
425 ─│ server retrieves│
│ associated info │
│ from Smart      │
│ Transfer database│
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ Return the basic│
│ account info and│
430 ─│ the associated info│
│ to the Smart    │
│ Transfer client as│
│ the caller info │
└─────────────────┘
```

**FIG. 4**

FIG. 5

**FIG. 6**

| 710A | 300 | 700A | 715A |
|---|---|---|---|
| Caller Information Data Field | Caller Information 705A | SALES PITCH PROFILE #1 — Match Criteria | MATCH? |
| Caller Preference | no preferences | partner C products or services | yes |
| History of past Pitches Presented | • partner A - long distance<br>• partner B - magazines<br>• presenter - online account upgrade | no prior pitch to caller regarding wireless service provided by partner C | yes |
| History of Services or Products Purchases from Pitch Presenter or Partners | • presenter - online account upgrade<br>• partner B - subscribed to music club | any | yes |
| Listing of Services or Products Currently Enrolled in by Caller | • presenter - online account upgrade | no current enrollment in wireless service offered by partner C | yes |
| History of Caller Misbehavior | no misbehavior | no misbehavior | yes |
| Credit Status of Caller | AAA+ | AAA or better | yes |
| Account Information | | | |
| • account type | platinum | any | yes |
| • account status | delinquent | paid up | no |
| • method of payment | credit card —730A | credit card —725A | yes |
| Caller Demographic Information | —720A | 735A— | |
| • sex | F | any | yes |
| • age | 28 | 18 or greater | yes |
| • marital status | M | any | yes |
| • place of residence | Durham, NC | United States | yes |
| • profession | financial analyst | any | yes |
| • avocation(s) | scuba, music, stock market | any | yes |

**FIG. 7A**

| Caller Information Data Field | Caller Information | SALES PITCH PROFILE #2 700B | MATCH? 715B |
|---|---|---|---|
| | | Match Criteria | |
| Caller Preference | no preferences | partner C products or services | yes |
| History of Past Pitches Presented | • partner A - long distance<br>• partner B - magazines<br>• presenter - online account upgrade | no prior pitch to caller regarding upgraded wireless coverage offered by partner C | yes |
| History of Services or Products Purchases from Pitch Presenter or Partners | • presenter - online account upgrade<br>• partner B - subscribed to music club | any | yes |
| Listing of Services or Products Currently Enrolled in by Caller | • partner A - online account upgrade | no current enrollment in upgraded wireless service offered by partner C | yes |
| History of Caller Misbehavior | no misbehavior | no misbehavior | yes |
| Credit Status of Caller | AAA + | AAA or better | yes |
| Account Information | | | |
| • account type | platinum | any | yes |
| • account status | delinquent | paid up | no |
| • method of payment | credit card 730B | check 725B | no |
| Caller Demographic Information | 720B | 735B | |
| • sex | F | any | yes |
| • age | 28 | 18 or greater | yes |
| • marital status | M | single | no |
| • place of residence | Durham, NC | United States | yes |
| • profession | Financial Analyst | any | yes |
| • avocation(s) | scuba, music, stock market | any | yes |

**FIG. 7B**

| | | | 825 | 820 | 810 |
|---|---|---|---|---|---|
| Caller Information Data Field | Caller Information | SALES PITCH PROFILE #3  815 — Match Criteria | Criteria Weight | Match? /Match Value | Weighted Match Value |
| Caller Preference  895 | Prefer not to receive any sales pitches | not adverse to partner C products or services | 20 —896 | no/-1 —894 | -20 —897 |
| History of Past Pitches Presented | • partner A-long distance<br>• partner B-magazines<br>• presenter -online account upgrade | no prior pitch to caller regarding wireless services provided by partner C | 0 | yes/1 | 2 |
| History of Sevices or Products Purchases from Pitch Presenter or Partners | • presenter -online account upgrade<br>• partner B-subscribed to music club | any | 0 | yes/1 | 0 |
| Listing of Services or Products Currently Enrolled in by Caller | • presenter -online account upgrade<br>   partner C-wireless service | no current enrollment in wireless service offered by partner C | 10 | no/-1 | -10 |
| History of Caller Misbehavior | no misbehavior | no misbehavior | 0 | yes/1 | 0 |
| Credit Status of Caller | AAA+ | AAA or better | 2 | yes/1 | 2 |
| Account Information  870  840 | | —875 | 885 | | —890 |
| • account type | platinum—883 | silver - platinum | 1—880 | yes/1 | 1 |
| • account status | delinquent —855 | paid up —845 | 2—850 | yes/1 | -2 —865 |
| • method of payment | credit card | any | 0 | yes/1 | 0 —860 |
| Caller Demographic Information | | | | | |
| • sex | F | any—830 | 0 | yes/1 | 0 |
| • age | 28 | 18 or greater | 10 | yes/0 | 0 |
| • marital status | M | single | 0 | yes/1 | 0 |
| • place of residence | Durham, NC | United States | 10 | yes/0 | 0 |
| • profession | financial analyst | any | 0 | yes/1 | 0 |
| • avocation(s)  891 | scuba, music, stock market | any—835 | 0—892 | yes/1 | 0—893 |

Profile Correlation Value: -27  ◄— 805

## FIG. 8

900

| SALES PITCH LOOK-UP TABLE ||
|---|---|
| Sales Pitch Profile | Sales Pitch |
| Profile_1 | Profile_1 |
| Profile_2 | Profile_2 |
| Profile_3 | Profile_3 |
| . . . | . . . |
| Profile_n-1 | Profile_n-1 |
| Profile_n | Profile_n |

610                                                                615

**FIG. 9**

250

Smart Transfer client generates a feedback message containing information related to the response
— 1105

Smart Transfer client communicates the feedback massage to the Smart Transfer Server through the computer network
— 1110

Smart Transfer Server updates the first and second databases using the information in the feedback message
— 1115
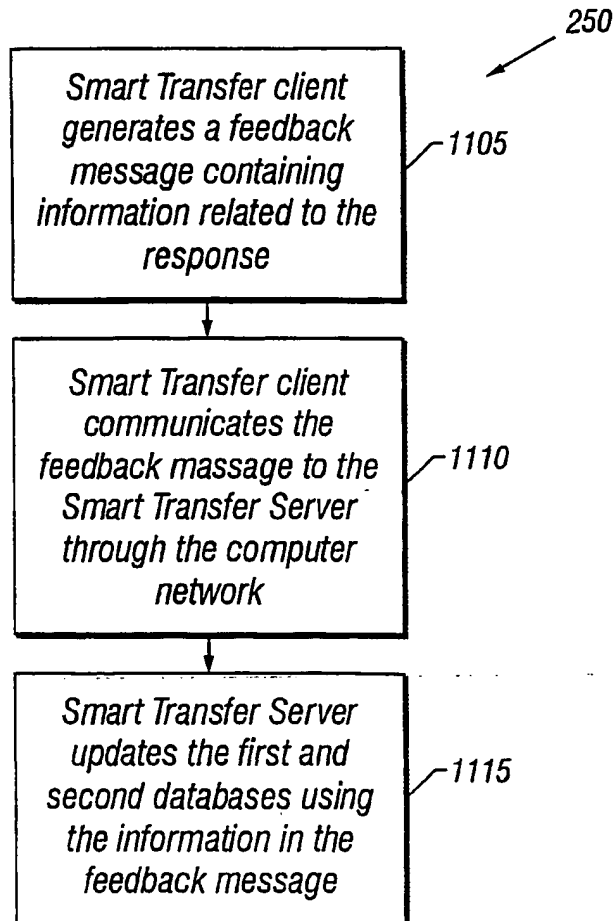
**FIG. 11**

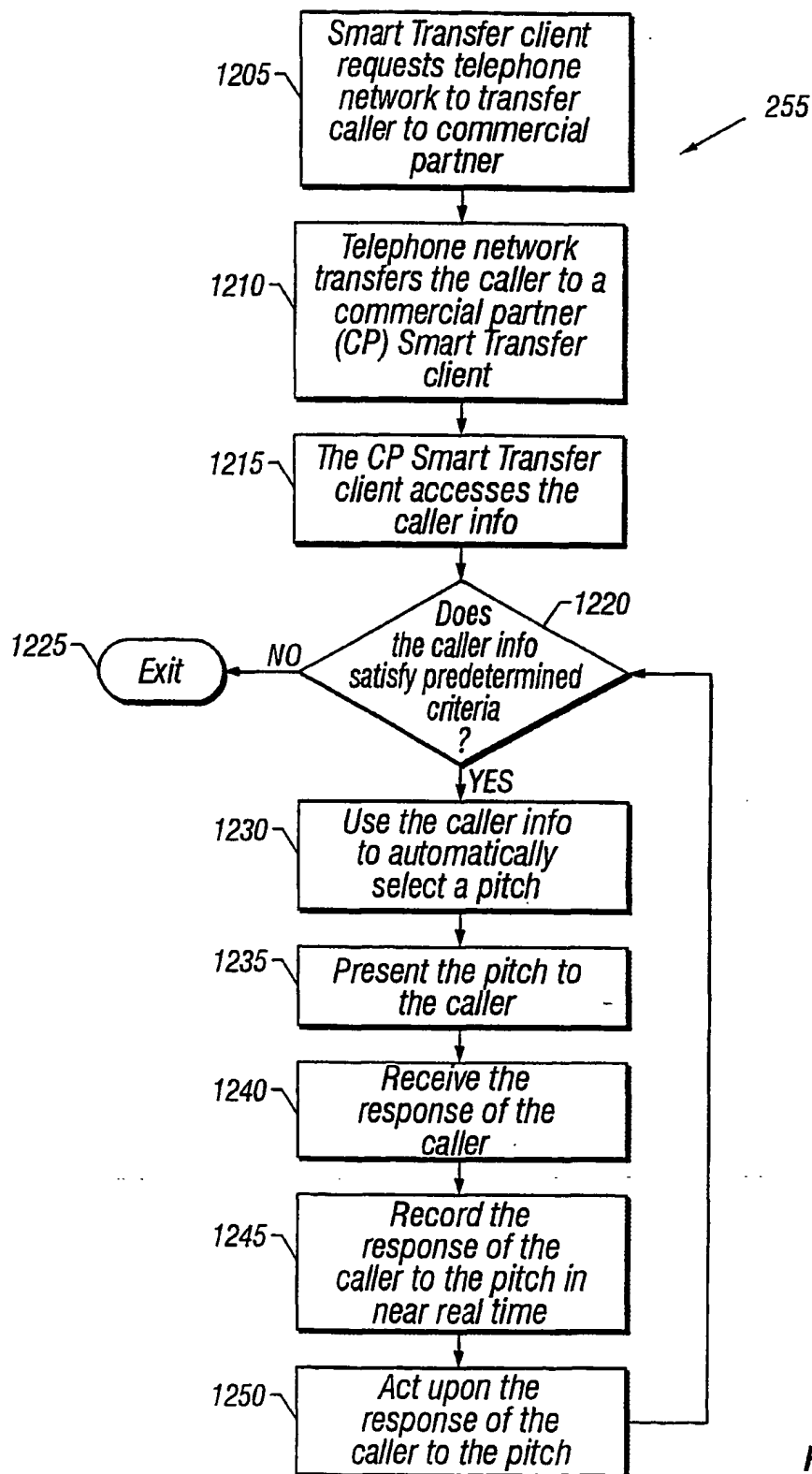| Partner | Program | DISTRIBUTION (within Partner) | SCRIPT |
|---|---|---|---|
| Internal (25% of Total) | Sign On a Friend | 100% 1005 ➝ | "I would like to let you know that we will give you $50 every time you sign on a friend or family member before April 30th. This will assist you in adding more friends and family to your Talk list and in keeping in touch. We'll be happy to mail out a 500-hour Free trial disc of our Latest Software to your friend or family member has been a member for 90days, we'll mail you a check for $50! Who do you have in mind? If NO: "OK, Happy we were able to assist today." If YES: "Great, I'll just process this order for the Free Trial Software to be mailed out immediately. Who else would you like us to send a Free Trial Software package to?" Thank you and have a great day." |
| Partner A (35% of Total) | Voyagers' Edge | 70% 1010 ➝ | "Before I let you go, I want you to know that we have arranged for you to receive a Getaway Weekend and a free trial membership in our Voyagers' Edge program. May I connect you for more details?" If YES: "Great, I'll transfer you now." |
|  | Emerald Vista | 30% 1015 ➝ | "Before I let you go, I want you to know that we have arranged for you to receive a Free Personal Electronic Organizer and a free trial membership in our Emerald Vista program. May I connect you for more details?" |
| Partner B (30% of Total) | Long Distance Service | 100% 1020 ➝ | "For being a valued Member you are eligible TO EARN UP TO THREE MONTHS OF our Service for trying an exclusive member benefit. What I'm going to do is bring someone on the line who can give you all the details... OK?" If YES: "Great, I'll transfer you now." |
| Partner C (10% of Total) | Magazine Trial | 100% 1025 ➝ | "Because you are a valued customer, we've arranged for you to try up to 2 magazines free for 2 months. You can choose from Entertainment by the Minute, Wealth, The Beautiful and The Famous, Athletics Illuminated, or Epoch" If YES: "May I connect you for more information?" |

**FIG. 10**

SUBSTITUTE SHEET (RULE 26)

```
                  ┌──────────────────────┐
                  │   Smart Transfer client │
           1205 ─┤  requests telephone    │
                  │  network to transfer   │        ╱ 255
                  │  caller to commercial  │      ╱
                  │       partner          │
                  └──────────┬───────────┘
                             ▼
                  ┌──────────────────────┐
                  │  Telephone network     │
           1210 ─┤ transfers the caller to a│
                  │ commercial partner     │
                  │ (CP) Smart Transfer    │
                  │       client           │
                  └──────────┬───────────┘
                             ▼
                  ┌──────────────────────┐
           1215 ─┤  The CP Smart Transfer │
                  │  client accesses the   │
                  │      caller info       │
                  └──────────┬───────────┘
                             ▼
                          ◇ 1220
                       ╱  Does  ╲
   1225 ─┐      NO    ╱ the caller info╲
  ( Exit )◄──────────╱ satisfy predetermined╲◄────┐
                     ╲   criteria   ╱             │
                      ╲      ?     ╱              │
                       ╲ YES ╱                    │
                         ▼                        │
                  ┌──────────────────────┐        │
           1230 ─┤  Use the caller info   │        │
                  │  to automatically      │        │
                  │    select a pitch      │        │
                  └──────────┬───────────┘        │
                             ▼                     │
                  ┌──────────────────────┐        │
           1235 ─┤  Present the pitch to  │        │
                  │      the caller        │        │
                  └──────────┬───────────┘        │
                             ▼                     │
                  ┌──────────────────────┐        │
           1240 ─┤   Receive the          │        │
                  │   response of the      │        │
                  │      caller            │        │
                  └──────────┬───────────┘        │
                             ▼                     │
                  ┌──────────────────────┐        │
                  │   Record the           │        │
           1245 ─┤  response of the       │        │
                  │ caller to the pitch in │        │
                  │    near real time      │        │
                  └──────────┬───────────┘        │
                             ▼                     │
                  ┌──────────────────────┐        │
           1250 ─┤   Act upon the         │        │
                  │  response of the       │────────┘
                  │ caller to the pitch    │
                  └──────────────────────┘
```

FIG. 12